Master Phone Script for Virtual Meeting

Hi\_\_\_\_did you get an opportunity to read my email that I sent a couple of days ago? Fantastic! What about my book? Super. First, let’s talk about what’s most important here, how are you and your family with all of this?

I understand. It’s a challenging time. Let me ask you, what type of benefit plan do you have currently. You have about \_\_ employees? And you have been in business since \_\_? How long have you had your plan? What’s participation like? Whose currently servicing your plan? And you match?

Great. You given me enough information to really be able to perhaps spend 20 minutes at a scheduled time we both could talk and let me provide a couple of ideas that I believe will benefit you and your team.

I could be ready by tomorrow at 1 p.m. Would that work for you? I would like to do a webinar through gotomeeting if that’s okay with you so I can show you some numbers. Would that work? Great. Is there anyone else you would like to have on the call?

Sure.

\_\_\_, I’ll be ready by 1 p.m. tomorrow. I will send you a call in number within the next few minutes.

Okay, so no plan. Why not? I see. You have about \_\_\_ full time employees correct? \_\_, a lot of times individuals just don’t have enough information to make a legitimate decision. In twenty minutes, I could give you a great overview of available plans and how they work. You might be excited to know what some of the opportunities could do for you and your team. Are you available for that twenty minute discussion now or would you prefer to set a time later today or tomorrow?